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LEGAL OPERATIONS

SPECIAL REPORT

Legal Operations Special Report

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Solution by Organization Size		
Small Organization: 1-100 Employees	Midsize Organization: 101-1,000 Employees	Large Organization: 1,000+ Employees
	 	 

About

The Legal Operations Special Report is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) legaltechmg.com.

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Welcome to Legal Tech Publishing's Legal Operations Special Report

By: Cathy Kenton and Brian Dalton



Cathy Kenton
CEO, Legal Tech Media Group/
Legal Tech Publishing

As Above the Law has noted: "When it comes to in-house work, it's a legal operations world, and we're all just living in it."

Indeed, legal ops continues to maintain a high profile in law departments, while the related technology runs to the core of corporate strategy.

In this special report, we're pleased to share the latest in the technology that supports legal operations.

We hope you use it to ensure your team's role as a vital contributor to your organization's success.

Thanks,

Jeremy Barker
Director of Content Marketing,
Breaking Media



Brian Dalton
SVP, Breaking Media



Jeremy Barker
Director of Content Marketing,
Breaking Media

Navigating the Complexity: CobbleStone Contract Insight Delivers Centralized and AI-Backed Contract Management

CobbleStone Contract Insight leverages VISDOM, its powerful AI engine backed by machine learning that streamlines data insertion, extraction, evaluation, and risk identification. Data entry and extracting critical details like dates, monetary values, and counterparties is automated. VISDOM assesses risk by analyzing document text on a rules-based sentiment.”

Company Name Brand
CobbleStone Software

Product Name Brand(s)
CobbleStone Contract Insight®

Latest Developments and Updates

- Preferred clause replacement – users can quickly and easily obtain side-by-side clause comparisons and system-provided suggestions for clause replacement recommendations based on language within the third-party document and standard language within their clause library.
- IntelliDraft.AISM – CobbleStone® released a portal that includes support for client requirements around clause support/management, access to a library with up to 1 million clauses, generative artificial intelligence (AI) clause creation from real machine learning (ML) data, contract summarization, a user-friendly chatbot, and more.
- ConfigAISM – to speed the adoption of contract management software, CobbleStone's ConfigAI can offer

proactive contract lifecycle management (CLM) field suggestions for contract clause metadata fields.

- Auto-Redline – users can establish automatic redlining upon upload or redline documents on an as-needed basis. They may also easily see and manage automated redlines and comments with thorough audit trails. CobbleStone Auto-Redline is compatible with Word and CobbleStone's native online document editor.
- VISDOM+ – ask the VISDOM® Assist chatbot system-related questions and receive answers powered by OpenAI. Additionally, VISDOM will identify contract obligations for user review, and users can ask about applicable laws and compliance regulations such as GDPR, CCPA, and OFAC and generate related clauses.

Next-Level Contract Management

The demand for contract lifecycle management solutions has never been stronger, and to meet that demand, CobbleStone Software provides a highly configurable solution called CobbleStone

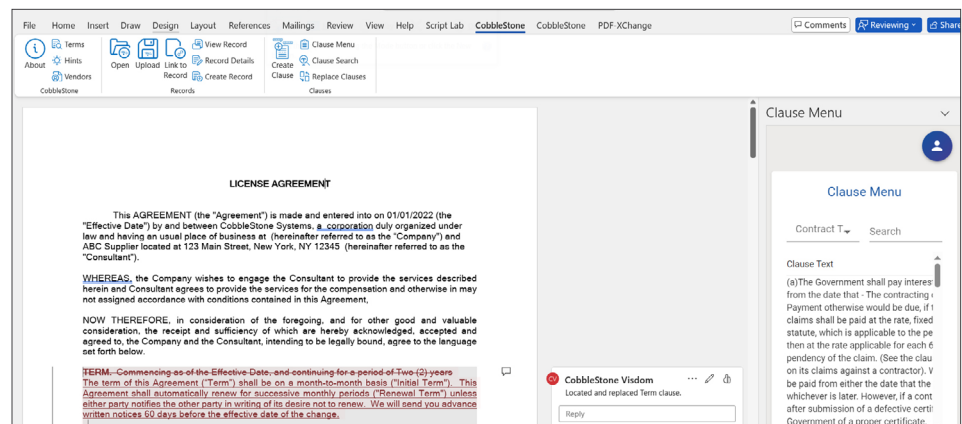


Figure 1: CobbleStone Contract Insight offers an auto-redlining feature powered by VISDOM AI. Handle auto-redlining directly or set it up to execute whenever a contract record receives a .docx file attached. CobbleStone shows the clause menu to the right of a Word document (or within the comparable/similar CobbleStone native online editor), and a CobbleStone toolbar is available to assist with edits.

“CobbleStone’s Auto-Redlining can locate and redline clauses within contract files and recommend modifications based on preferred contract clause versions to standardize terminology, improve consistency, and ensure accurate language. The contract library is entirely customizable for the company’s needs.”

Contract Insight. There are many challenges to managing the contract lifecycle, including decentralized contract storage, contract language and clause limitations, a lack of version control, delays and mistakes in contract approvals and signatures, missed key dates and workflow tasks, and missed contract renewal opportunities. CobbleStone Contract Insight is a comprehensive, end-to-end CLM solution that transforms static contracts into dynamic, efficient building blocks for oversight, risk mitigation, and opportunity identification. Staff members, counterparties, employees, and other key stakeholders can leverage a user-friendly portal and simple intake forms to submit a new request. The portal also features internal reviews, streamlining the process of gathering, tracking, reviewing, and approving contract requests. Companies can assemble and configure essential contract data fields to produce consistent documents.

CobbleStone’s AI Capabilities Empower Effective Drafting

Drafting contracts has been simplified in CobbleStone through the power of several native AI tools. CobbleStone Contract Insight leverages **VISDOM**, its powerful AI engine backed by machine learning that streamlines data insertion, extraction, evaluation, and risk identification. Data entry and extracting critical details like dates, monetary values, and counterparties is automated. VISDOM assesses risk by analyzing document text on a rules-based sentiment. You can upload files and convert requests to contract records

without data loss or re-keying, driving consistency and reducing potential mistakes. Users can also start from scratch, leveraging pre-approved templates and clauses. Team members will have unlimited user-defined fields to accommodate tailored contract details.

CobbleStone’s Auto-Redlining can locate and redline clauses within contract files and recommend modifications based on preferred contract clause versions to standardize terminology, improve consistency, and ensure accurate language. The contract library is entirely configurable for the company’s needs. See *Figure 1 on the previous page*.

IntelliDraft.AI is a generative AI tool for real-life clause search and generation with a user-friendly chatbot interface that searches through thousands of example clauses. Contract teams input key search terms, and IntelliDraft.AI returns relevant results and generates configurable clauses based on your needs. The resulting clause can be copied directly from IntelliDraft.AI. Additionally, users can summarize the language of a clause or generate another clause variation for different versions of the clause.

IntelliXtract identifies and extracts legal terms using natural language processing and recognizes structured data and legal phrases with fuzzy logic matching. CobbleStone’s Theory Calculator provides automated data analysis and on-screen recommendations, enhancing visibility and strategy throughout contract lifecycle administration.

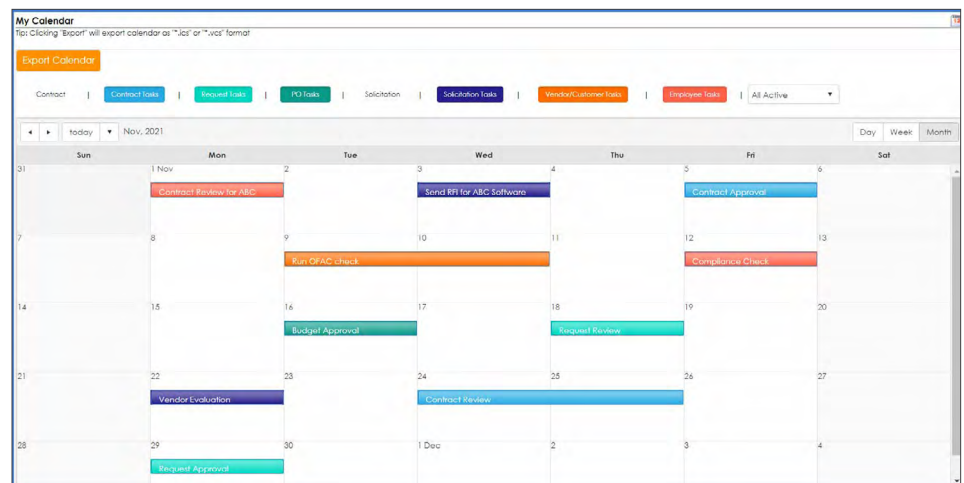


Figure 2: My Calendar helps users stay informed about critical contract milestones by displaying contract and task alerts, including expiration dates, review dates, and expiration notification dates.

“IntelliDraft.AI is a generative AI tool for real-life clause search and generation with a user-friendly chatbot interface that searches through thousands of example clauses. Contract teams input key search terms, and IntelliDraft.AI returns relevant results and generates customizable clauses based on your needs.”

Workflows Tailored to How Your Company Works

Based on request types, data fields, and rules, CobbleStone enables automated workflows for contract approval. Users can approve or reject contract requests directly within the workflow, and automated alerts and notifications ensure timely action on contract events and milestones—eliminating bottlenecks. CobbleStone features a workflow visualizer that shows contract approval expectations, ensuring a team is on the same page. CobbleStone populates key dates, making it easier for team members to meet deadlines, and users can track their obligations using tools such as My Dashboard and My Calendar. See Figure 2 on the previous page.

Analysis Through Powerful Reporting

CobbleStone Contract Insight provides comprehensive real-time tracking and reporting features for contract management, enhancing financial visibility and decision-making. Financial tracking assists in budget management by logging payments, income, and other financial transactions and data related to contracts. Companies can configure fields to capture specific information relevant to their business.

Graphical dashboards display key performance indicators (KPI), making the information easily accessible. Financial and

KPI dashboards provide an overview, including budget details and transaction history. Because the dashboards are configurable, users can visualize critical financial metrics, identify trends, and monitor compliance. The contracts KPI dashboard compares current contract performance data to the previous year, displaying contract and budget amounts, contract diversity by department, and contracts expiring within 30 days. The contracts overview dashboard presents an executive summary of contract statistics and highlights contracts assigned to employees, upcoming expirations, and active requests. Contracts can be visualized by department, showing counts, total values, trends, and patterns. These dashboards empower users with essential insights right when they enter the system, promoting efficient contract management. See Figure 3.

Integrations

There are hundreds of plug-and-play interfaces and integrations between CobbleStone Contract Insight and third-party technology solutions. These include integrations with popular tools used by legal teams, such as Adobe Acrobat E-Sign, DocuSign, SignNow, CobbleStone's own IntelliSign®, and other signature systems, as well as integrations with legal-focused products like issue management, case management, and billing.

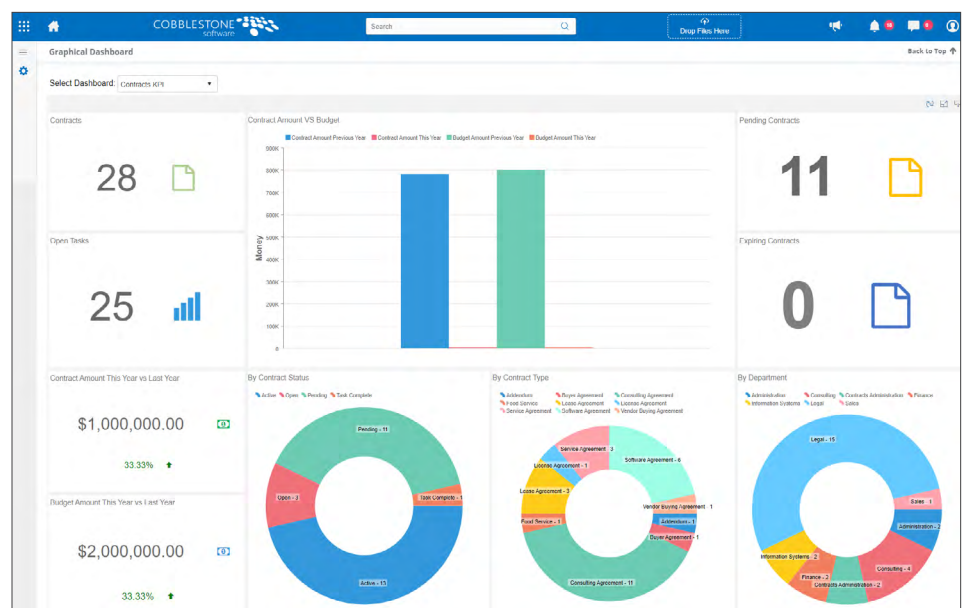


Figure 3: CobbleStone Contract Insight offers executive graphic dashboards that enhance contract analytics and data-driven decision-making. Users can choose which dashboard to view via a drop-down menu. In this dashboard, users can see contracts by status, type, department, contract values, number of pending or expiring contracts, and open tasks.

Pricing

CobbleStone [offers multiple pricing options](#) and works with you to review features and help determine the best edition to fit your needs. The entry-level subscription–Express Edition–starts at \$59 per user per month and offers considerable features at a very reasonable price, such as configurable fields, key date notifications, unlimited contract storage, and searching and reporting. The main product–Enterprise Edition–varies in price depending on several aspects, such as the deployment strategy, which offers options for on-premises installation and SaaS/ cloud deployment. CobbleStone also provides unlimited contract storage with named or concurrent user licenses.

Who is CobbleStone?

CobbleStone's headquarters are in New Jersey, with employees across the USA and offices in Canada, the UK, and Australia, with plans to continue expanding globally.

CobbleStone has offered contract management software for more than 25 years. They serve more than 1,300 clients globally in over 25 industries, including manufacturing, government, banking, healthcare, pharmaceuticals/life sciences, and energy. The corporate legal and procurement departments of Fortune 1000 and mid-market companies comprise the majority of the user base, and the system offers department-wide benefits as well. Enterprise deployments allowing users throughout an organization to submit contracts and see their status via role-based dashboards have become considerably more widespread.

Why Buy CobbleStone?

- CobbleStone is purposefully built software that simplifies and enhances the entire contract management lifecycle.
- AI functionality is incorporated in multiple processes to improve productivity and save time and money.

- Clients can configure the platform to meet their needs.
- CobbleStone offers significant resources and support and can assist companies in [making a case for Contract Management Software](#).

See CobbleStone

Contract Insight Today!

[Schedule a demo](#) to learn more about how to benefit from CobbleStone Contract Insight or sign up for a [free trial](#). CobbleStone also attends and hosts [a variety of events](#) throughout the year.



Filevine Docs+ and AI Functionality Help You Accelerate Legal Work, Reduce Errors, and Gain Insight

“Text included in photographs or scanned documents can be searched thanks to OCR technology, and material in other file types, such as DOCX, PDF, and RTF, can be quickly detected thanks to document indexing.”

Company Name Brand
Filevine

Product Name Brand(s)
Filevine; Docs by Filevine; Periscope by Filevine

Latest Developments and Updates

- Docs by Filevine, launched in June, provides advanced document management for law firms.
- Medical Timeline streamlines the organization and analysis of medical records within legal cases.
- AI Document Review leverages artificial intelligence (AI) to extract and organize information from legal documents.

Broad Legal Functionality Supercharged by AI

The concept behind Filevine's name is that data grows in a case akin to a vine's leaves. Users can avoid needing to remove Filevine's leaves from several locations and programs by using Filevine to aggregate emails, tasks, documents, and more. Attorneys and paralegals can easily collaborate inside the firm thanks to Filevine's unified platform, giving them access to all their leaves in one location.

Legal teams have simple access to every aspect of their cases thanks to Filevine's user-friendly interface. The platform offers several AI-powered features that streamline workflow, improve collaboration and security, and free up lawyers' time for other essential duties.

Docs by Filevine

Docs by Filevine is an **advanced document management system** designed specifically for law firms and legal departments. Docs utilizes optical character recognition (OCR) to search for terms within all documents, including PDFs and photos of documents. Its quicker and more accurate search features significantly improve the user experience. Users can easily go to specific document portions using intra-doc search, which identifies crucial information. Text included in photographs or scanned documents can be searched thanks to OCR technology, and material in other file types, such as DOCX, PDF, and RTF, can be quickly detected thanks to document indexing.

Unlimited storage allows a firm to maintain all documents in one place, regardless of size or format. Centralized storage eliminates the need for costly paper

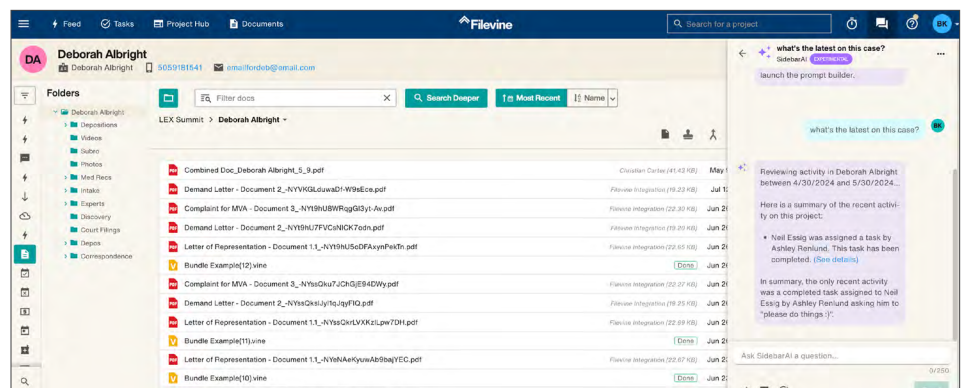


Figure 1: Docs by Filevine provides standard organizational features like sub-folders. The differentiator is the embedded AI tools, like SidebarAI (featured in this image). Users can get case summaries by simply asking SidebarAI a question.

“SidebarAI is an AI-driven chatbot that delivers guidance, simplifies circumstances, and quickly answers "how-to" questions. SidebarAI summarizes activity within cases and projects on demand.”

storage solutions, enhancing efficiency. Filevine's robust security ensures document safety while improving productivity and client satisfaction. Unlimited Storage ultimately means law firms never need to worry about running out of space to upload documents, contracts, and records securely.

Filevine offers other built-in tools, including conflict checker and PDF editing. Conflict checker scans uploaded documents for potential conflicts, saving time and mitigating ethical risks. PDF editing empowers users to edit PDF files directly within Filevine, including adding text, redacting, highlighting, and collaborating through comments.

Filevine manages documents globally, allowing users to view documents based on flexible criteria, such as recent activity, document modifications, and search functionality. The search feature lets users filter documents by case, tags, document content, and emails. Additionally, every document entering the system is run through an anti-virus scan; positive hits are quarantined, and users are notified.

AI Functionality

The benefits of AI in legal practice are numerous. Filevine uses AI to automate tasks, provide valuable data insights, reduce costs, identify critical information and inconsistencies, and prioritize security through encryption, access controls, audit trails, and compliance with legal standards. SidebarAI is an AI-driven chatbot that delivers guidance, simplifies circumstances, and quickly answers "how-to" questions. SidebarAI summarizes activity within cases and projects on demand. Once logged into Filevine, a user selects SidebarAI and begins a conversation by simply typing a question about their project or even how to do something in Filevine. SidebarAI searches the project or the Help Center for the relevant information and returns the results. *See Figure 1 on the previous page.*

Filevine takes AI to another level with its Docs+ application. Manual document review poses a significant challenge for legal professionals because it is a time-consuming process that can lead to errors, especially when dealing with large volumes of information. Human review is prone to error or missing information, which can

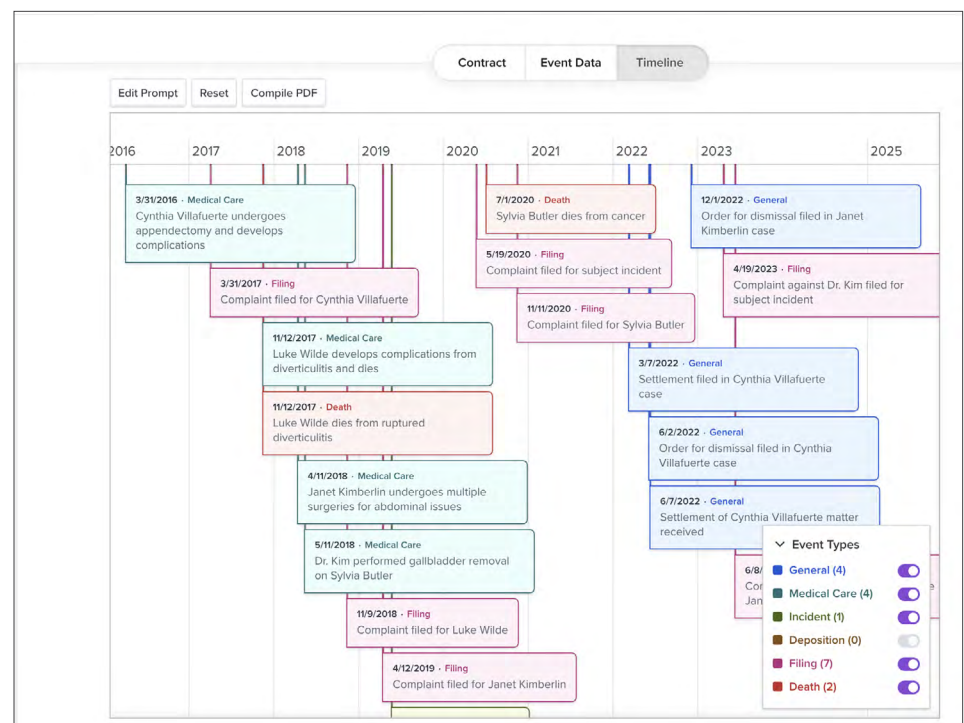


Figure 2: Visual medical timelines can be generated with a click, organizing medical records and automating the process of breaking down information from each date of service without additional input. Event types can be excluded by toggling preferences. This creates a comprehensive medical chronology across all records for a case and saves both time and money.

“Based on data analysis, managers can identify efficient workflows, address inefficiencies, and optimize operations. Compare case settlements to understand the factors behind high or low results. Audit reports track user activity, allowing managers to monitor team performance at an individual level.”

have a detrimental effect on case results and customer satisfaction. AI Doc Review harnesses the power of AI to transform legal document analysis. AI Doc Review automates data extraction by quickly identifying and extracting key information from documents, reducing manual effort and the risk of human error. Users gain deeper insights by uncovering patterns, trends, and connections within their documents that might not be immediately apparent through manual review. Efficiency is improved by enhancing the legal document review process, allowing teams to focus on higher-value tasks requiring human expertise. Filevine's AI Doc Review is explicitly designed for the legal industry, ensuring it understands legal documents' unique language and context. It's more than just a time-saving tool; it's a transformative solution that empowers legal professionals with enhanced capabilities.

DemandsAI transforms the process of creating demand letters for legal professionals. Compelling demand letters can be crafted in minutes, freeing time to focus on other high-value tasks and exceptional client service. Leverage AI to build stronger arguments backed by relevant facts and precedents.

Medical Timeline

Filevine's medical timeline feature is designed to streamline the organization and analysis of medical records within legal cases. AI-generated medical summaries

are created so teams can review medical records and extract essential details, including chief complaints, medical history, procedural codes, medications, and follow-up instructions. Medical events can be arranged in chronological order and in a clear timeline, making it easier to track the progression of a patient's health. Additionally, team members can fact-check and view source information with embedded links to the original document pages for reference. Users will save time by automating the compilation of medical chronologies, which are crucial for building strong legal arguments. *See Figure 2 on the previous page.*

Reporting – Up Periscope!

A critical aspect of legal operations is the ability to track financial and organizational information to make data-driven decisions and improve and increase business. **Filevine Periscope™** is a highly configurable and mobile-friendly reporting application with the ability to customize data fields, apply filters for specific case types, and provide data-backed insights into team productivity, workflows, and decision making. Users can export data from Filevine reports into tailored visualizations using Periscope. Based on data analysis, managers can identify efficient workflows, address inefficiencies, and optimize operations. Compare case settlements to understand the factors behind high or low results. Audit reports track user activity, allowing managers to monitor team performance at an individual level. *See Figure 3.*

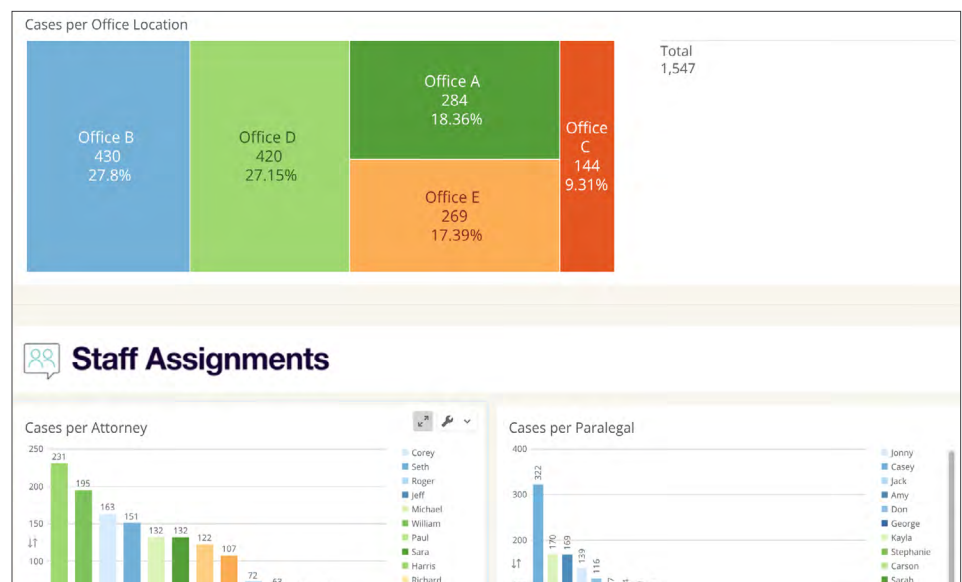


Figure 3: Periscope provides easy access to information, such as individual contributor productivity, arming managers to make data-driven decisions.

Integrations

In addition to tight integration with Microsoft Office, Filevine offers an open API and plays well with other applications to customize Filevine as a single location for daily tasks. Plugins work in both the desktop and mobile versions. The Outlook plugin enables users to attach emails to cases, add time entries, and manage case-related documents and tasks without leaving the inbox. It also allows users to search for cases and contacts and copy documents and contact information directly from a case to an email and vice versa. The most common integrations include Zapier, Slack, and Google (calendar, Gmail).

Pricing

All Filevine licenses include unlimited document storage, cloud-based case and task management, scheduled reports, automated workflows, calendaring, team collaboration tools, contact management, guest access, instant email and text communication, enterprise-level security, and powerful integrations. More modules

are offered for an additional cost. For detailed pricing and further information, please contact Filevine.

Who is Filevine?

Filevine is changing how legal work gets done for law practitioners and their clients. As a leading legal operating system, Filevine is dedicated to empowering organizations with tools to simplify and elevate complex, high-stakes legal work. That is why Filevine offers a full suite of custom-built AI-powered solutions with the legal user in mind. Filevine powers everything from lead intake and e-signatures to document assembly and case management, timekeeping, billing, payments, and business analytics. Over 3,400 law firms and legal teams use Filevine daily to deliver excellence. Filevine is recognized on the Deloitte Technology Fast 500 and Utah Business Fast 50 lists, is a Top Workplace USA winner, and is among the fastest-growing companies on the 2023 Inc. 5000 list.

Why Buy Filevine?

- Deliberate development to streamline and simplify legal work and collaboration, including specific applications to simplify complicated and document-intensive document generation, such as [ImmigrationAI](#).
- Incorporating AI extraction and AI generation steps into the document assembly process saves time and improves accuracy.
- Best-in-class security and unlimited storage.
- Multiple customer support options, including live help and expert teams.
- Ongoing new feature development to smooth out the process of document assembly and legal workflows.

See Filevine Today!

[Schedule a demo](#) to learn how Filevine's unlimited storage can benefit any company! And read a case study to discover how one firm [solved its storage woes](#) with Docs+ by Filevine.

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